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# ORGANIZATION LOGISTICS PLANNER'S GUIDE

Prepared by  
OFFICE OF LOGISTICS

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# ORGANIZATION LOGISTICS PLANNER'S GUIDE

## INTRODUCTION

1. The evolution of Organization materiel doctrine and the development of different types of operations, together with the need for rapid and positive actions to meet sudden requirements, cause the practice of Organization logistics to be complex and ever-changing. The logistics officer has the assigned tasks of developing logistics support plans and performing those logistics functions necessary to the implementation of the plans. Logistics planning, as applied in this Guide, is that planning to accomplish:

- a. Acquisition, storage, movement, maintenance, distribution, and disposition of materiel.
- b. Acquisition or construction, maintenance, operation, and disposition of facilities.
- c. Acquisition or furnishing of logistic services.
- d. Movement of personnel and baggage.

2. The purpose of this Guide is to provide the logistics officer with the basic logistics planning data and formats for use in developing logistics support plans. The Guide has been compiled to provide information, procedures, and references in a form that will assist the user in his day-to-day planning tasks. For those requirements which are beyond the scope of this Guide, a list of appropriate references is included at Appendix VIII.

3. Users of this Guide are requested to submit recommendations for changes or corrections to the Director of Logistics, Attention: Planning Staff.

## ORGANIZATION LOGISTICS PLANNER'S GUIDE

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*Prepared by the Office of Logistics Planning Staff*

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## CHAPTER 1

### LOGISTICS OFFICER

#### 1. Functions of the Logistics Officer

a. The logistics officer is a member of a group organized to assist the chief in the execution of his mission. He may function on an Organization staff that deals solely with logistics matters; he may function on an Organization support-type staff, either individually or with other logistics or support officers; or he may function individually under a chief of a division or station.

b. The chief and his logistics officers assist in the accomplishment of the overall Organization mission by providing for the successful accomplishment of the missions of the support elements. The logistics officer must utilize and help to administer the resources of time, space, and materiel in the accomplishment of the overall mission.

c. The proper use of these resources requires the performance of the following basic functions:

(1) *Securing Information.* This means more than simply receiving and examining information. It means going and getting it from any and all possible sources. The information must be reliable, timely, and as complete as possible. Information secured should also be made available to any branch or division which needs it. Accurate and complete information is required as the basis for all action.

(2) *Making Plans.* Plans are based on information and they result in decision. They must reflect good judgment, for much of the effectiveness of Organization projects will depend on the quality of the planning. In order to be meaningful, plans should answer the following questions: What has to be done? Who does it? When and where must it be done? Under what conditions? How should it be done? After plans are developed, programming and scheduling follow.

(3) *Coordinating.* Within the scope of this function, the logistics officer is required to secure agreement to, understanding of, and assistance in, the implementation of his task or project. He will have to determine the need for coordination and the people with whom to coordinate. He will have to determine the method (such as a meeting or conference), and then actually accomplish the coordination. Effective coordination will promote cooperation and reduce friction among those involved in the task or project.

(4) *Making Decisions.* The logistics officer will be called upon to make many decisions in carrying out the policies and directives of his chief. These decisions must be based on the best information available. As an example, a logistics officer who is charged with developing the table of equipment for a project must consider carefully all factors, such as temperature, climate, utilities, and physical characteristics of people involved. He will normally make decisions within the framework of established policy or recommend decisions to his chief as to the specific materiel to be used. The logistics officer usually will not be called upon to make command or policy decisions, but when such decisions are made by his chief, or higher authority, the logistics officer must be loyal and precise in the execution of his duties in support of these decisions. If established policy or procedures are conflicting or need changing, he should develop and submit to his chief specific recommendations for changes.

d. The logistics officer's specific duties will be in the fields of supply, transportation, procurement, real estate and construction, printing, and support services. He may be called upon to operate as a staff logistics officer or an operating logistics officer in performing his day-to-day work. *When the*

*requirements levied upon him are beyond his capabilities, he should call upon the Office of Logistics to assist him.* In this respect, the Planning Staff, Office of Logistics, is available to provide a wide range of assistance within the field of Organization logistics. This staff is the focal point for assistance in the development of plans and requirements. Direct contact with other staff elements of the Office of Logistics should be effected during the operational phase.

e. The logistics officer may be called upon to perform duties both of a staff and of an operating nature. Thus, he may be required to:

(1) Advise his chief on logistical matters and keep him informed on the logistical status of the Organization.

(2) Procure and maintain that logistics information required in fulfilling his mission.

(3) Prepare logistics estimates, plans, and staff studies.

(4) Prepare necessary documentation to obtain supplies and materiel.

(5) Prepare budgetary data necessary for logistics purposes.

(6) Coordinate and monitor the activities of his office with respect to logistics matters.

(7) Coordinate the utilization of materiel, services, and facilities between the using and supplying organizations.

(8) Coordinate the implementation of logistics plans.

(9) Exercise supervision over such logistical matters as his chief may designate.

f. The logistics officer may be assigned other duties. The above list is neither detailed nor all-inclusive. While his functions are basically centered around the fields of supply, transportation, procurement, real estate and construction, printing, and support services, there are differences in the scope of his activities at station, base, depot, division, and Headquarters levels.

## CHAPTER 2

### LOGISTICAL PLANNING

#### 1. Definitions

a. *Planning* is the systematic application of intelligence to a problem, the solution to which is not immediately apparent.

b. A *logistical plan* is a document designed and prepared to insure the availability of adequate resources to support an operational plan.

c. The *functional areas of logistics* in this Organization include supply, transportation, procurement, real estate and construction, printing, and support services.

#### 2. Logistical Estimate

a. Logistical planning must be carried out concurrently with, or in some cases prior to, operational planning. Coordinated logistical and operational planning are indispensable to the successful attainment of operational objectives.

b. The logistical estimate serves three broad purposes:

(1) It will bring into focus all the logistical implications of an operational plan.

(2) It will indicate whether the operation can be supported adequately.

(3) It will indicate one or more logistical courses of action to provide adequate support to the operational plan.

c. All logistical plans should be based on logistical estimates so that logistics planners can confidently advise as to whether operations can be supported.

d. A suggested format for a logistical estimate is attached as Appendix I. It incorporates instructions concerning the processes involved in its use. These processes are demanding in that they require an accurate status of facilities, stocks, and personnel to determine logistical capabilities for comparison with requirements in deriving proper courses of logistical action for support of operations.

#### 3. Development of Logistical Plans

a. Based on the logistical estimate, logistical plans should announce the decision of a headquarters for logistics support. Logistical plans should, where possible, provide for:

(1) Efficient use of transportation.

(2) Reduction in multiple handling of supplies.

(3) Reduction in time between ordering and receiving.

(4) Elimination, or reduction to a minimum, of requirements that do not contribute directly to the progress of operations.

(5) Maximum and efficient utilization of manpower.

(6) Economy in use of supplies and equipment.

(7) Elimination of nonessential and improbable contingency items.

(8) Establishment and maintenance of minimum supply levels.

(9) Alternate means to provide support and obtain flexibility.

b. In order to develop logistical plans, the following information is essential to the planner:

(1) He must be advised of the basic concept of operations early in the planning phase. Logistical considerations often alter or even dictate operational concepts.

(2) He must know force strengths and composition. Vehicles, weapons, transport replacement and consumption materials, reserve stocks and service requirements cannot be computed without a reasonable idea of numbers to be supported and composition of the organization.

(3) He must know transportation requirements and capabilities. The logistical planner must match these requirements against known

capabilities to insure that materiel can be moved in accordance with requirements. If reliable data is unavailable, estimates must be made based on available information. Transportation planning data must include the following:

- (a) Movement requirements for personnel and supplies.
- (b) Number, types, and characteristics of transport vehicles.
- (c) Terminal capacities in both the loading and unloading areas, as applicable.
- (d) Condition of airports and seaports to be used.

(4) The logistics planner must know the available sites for depots and service installations in the loading and unloading area, as applicable. Existing facilities should be used where feasible. Factors which govern the location of these installations include the ability to support the operation, accessibility to the existing transportation nets, and security conditions.

(5) The logistical planner must anticipate use of Organization, military, and other U.S. source labor and indigenous labor resources available. In many instances, it may be necessary to depend primarily on Organization personnel for labor because of security conditions. Where possible, other source labor should be used.

(6) A suggested format for the logistical plan is attached as Appendix II. It incorporates instructions concerning the processes involved in its use.

#### 4. Determination of Logistical Materiel Support Requirements

a. *Planning.* As a general rule, support requirements planning passes through three fundamental phases: Estimation, Calculation, and Modification. The first phase must be accomplished with few, if any, tangible figures. Each successive step in planning is developed with more concrete and accurate data than the preceding one until a firm list of materiel is evolved.

(1) *Estimation.* The initial step in the development of requirements often must be accomplished with little more than a brief statement of the mission and concept of operation.

Logistics planners employ broad experience factors such as replacement and consumption data and initial issue information. Factors representing the best available experience are used and the planner should make only such changes as later experience and background dictate.

(2) *Calculation.* Calculation of support requirements begins when estimates are received from supported and supporting elements. Total support requirements can be derived from these initial lists, which should be more accurate than the estimates used to initiate planning. However, support estimates should be evaluated and carefully scrutinized before acceptance. Calculation of requirements continues after the preparation of the initial support requirements. Factors and other data used in the initial estimations are discarded in favor of actual (or adjusted) figures extracted from the initial lists.

(3) *Modification.* Modifications, adaptations, or alterations dictated by policy, by direction, or by conditions peculiar to the area of operations are applied in the third phase. Each revision must be checked to make certain that all materiel aspects have been considered and that the resultant list is balanced.

b. *Procedural Steps for the Determination of Support Requirements.* The following steps are recommended as a guide for systematic support requirement determination planning:

(1) Operational missions and objectives generate support requirements.

(2) Approved operational requirements form the fundamental basis for determining support requirements.

(3) A forecast of projected operational requirements may be added directly or on a percentage basis to the initial approved operational requirements.

(4) Guidance must be provided from top policy and planning staffs to lower echelons to assist in requirement determinations.

(5) Support requirements, after determination and coordination, are submitted to senior echelon for approval.

(6) Upon approval, requirements are then firmly established for basis of procurement, storage, stockpile and distribution.



(7) Requirements should be reviewed and revised periodically as operational concepts are changed.

## 5. Determination of Logistics Personnel Requirements

a. The exact composition of the support organization depends upon certain variable factors which the planner must analyze continuously to provide adequate support. These are:

- (1) Size and mission of the supported force.
- (2) Capabilities, proximity to and availability of service elements [REDACTED] tion).
- (3) Nature of the area of operations.
- (4) Attitude, availability and capabilities of indigenous civilians (labor).
- (5) Extent of base-type development and construction to be undertaken.
- (6) Extent of service to be rendered.
- (7) Opposition capabilities to disrupt logistical operations.

b. Whatever the conditions, certain other basic considerations (not variable) must be intelligently applied. These are: a balanced force, necessity for providing a sound command structure, economy of force, and continuity of support.

c. The following basic steps are recommended as a general procedure in developing a support organization:

- (1) Determine functions and tasks to be performed.
- (2) Determine quantitative workload.
- (3) Select the type of personnel (unit) with the capability required.
- (4) Calculate the number of personnel required [REDACTED] ties of t [REDACTED]
- (5) Provide for command and control.

## 6. Standing Operating Procedures (SOP)

a. *General.* A standing operating procedure (SOP) is a set of instructions giving the methods to be followed by a particular element for the performance of those duties (operational and administrative) which the senior member desires to make routine. These instructions reduce the number and length of directives that must be issued. The purposes of the SOP are:

- (1) To simplify the preparation and transmission of directives.
- (2) To facilitate and expedite actions, both operational and administrative, and to minimize confusion and errors.

b. *Scope and Form.*

(1) Each subordinate element normally develops appropriate and effective procedures conforming to those established by the senior element. The SOP should be sufficiently complete to advise new arrivals or newly attached personnel of the procedures followed within an organization. The SOP's are based upon directives and policies of the next headquarters.

(2) The SOP's are published in a form most effective for the type of organization. The form utilized may be a single pamphlet or separate pamphlets, each pertaining to a separate function. Regardless of the form, the component parts make up the unit SOP and are published by authority of the senior representative. (See Appendix V for recommended format for an SOP.)

## 7. Standard Planning References

Appendix VIII contains a recommended list of standard references for logistics planning. It is not all-inclusive, and users of this Guide should consult indexes for additional references in researching a staff problem.

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## CHAPTER 3

### STAFF WRITING

#### 1. General

a. At all levels, the complexity of staff actions normally requires the use of written directives, reports, orders, and studies. The logistics staff officer must, therefore, develop his ability to write accurately, concisely and clearly.

b. A staff paper should satisfy the following principles:

##### (1) ACCURACY

- (a) Conform to facts.
- (b) Be free from error.

##### (2) BREVITY

Be accurate, concise and to the point.

##### (3) CLARITY

- (a) Use simple sentences.
- (b) Use correct grammatical construction.
- (c) Use correct punctuation.
- (d) Use only accepted abbreviations.
- (e) Eliminate vague, meaningless or ambiguous phrases.
- (f) Use topic sentences at start of each paragraph.
- (g) Should not sacrifice clarity for brevity.

##### (4) COHERENCE

- (a) Develop subject in logical sequence.
- (b) Place related items (ideas) in orderly sequence.
- (c) Present subject logically.

##### (5) COMPLETENESS

- (a) Present all logical alternatives.
- (b) Indicate that views of others concerned have been obtained and considered.
- (c) Present draft orders, letters or instructions for placing recommendations into effect.

##### (6) EMPHASIS

Stress the more significant points.

##### (7) OBJECTIVITY

- (a) Maintain an impersonal viewpoint.
- (b) Maintain an unbiased viewpoint.
- (c) Analyze all aspects of the problem.

##### (8) UNITY

Adhere to the subject.

##### (9) SIMPLICITY

- (a) Present facts simply and accurately so as to require a minimum of effort when reading the paper.
- (b) Do not indulge in flowery prose which detracts from the subject.

#### 2. Staff Study

The staff study is a formal staff paper containing a concise and accurate analysis and a recommended solution of a problem. It is the result of research and is the means of conveying to a superior a report of the analysis made by the writer, together with his conclusions and recommendations. It assists the superior in making a decision. *Appendix VI* prescribes the format of a staff study and a guide to the content of each paragraph.

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## CHAPTER 4

### PLANNING DATA

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SEC I — [REDACTED]

SEC VII — [REDACTED]

#### GENERAL:

a. This portion contains planning data which may be useful to the logistics planner in determining and satisfying logistics requirements.

b. The data has been extracted from various files and publications. It is based on experience and is subject to change as new experience is gained. For this reason, it is recommended that this data be subjected to realistic evaluation in the light of current experience.

SEC II — [REDACTED]

SEC III — Conex Data

SEC IV — [REDACTED]

SEC V — Aircraft Cargo Capabilities

SEC VI — [REDACTED]

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SECTION III  
CONEX DATA

<u>CONEX</u>	<u>CARGO</u>	<u>CAPACITY</u>	<u>SHIPPING</u>	
	<u>WGHT.</u>	<u>CUBE</u>	<u>MAX. WGHT.</u>	<u>CUBE</u>
1. Type 1	9000	135	10,500	180
2. Type 2	9000	295	10,500	365

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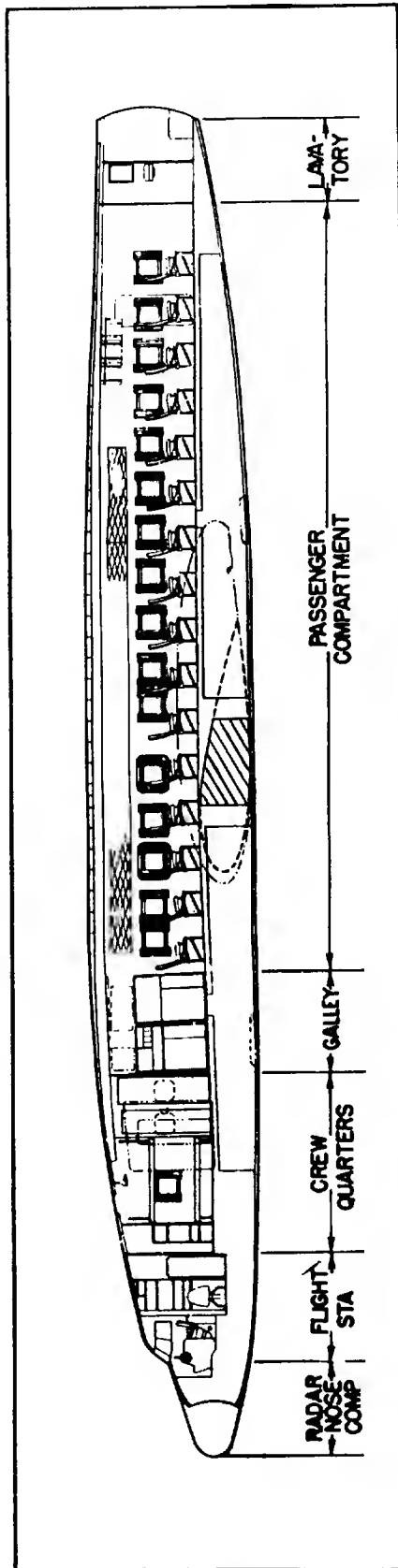


Figure 19. Cargo compartment, C-121.

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APPENDIX I

FORMAT FOR A LOGISTICAL ESTIMATE

1. **Mission:** A brief statement of the mission of the operation to be supported.

2. **The Situation and Other Considerations:**

a. **Operating Conditions:**

(1) **Characteristics of area(s) of operation:**  
Define the limits of the operational area and describe climatic, topographical and geographical factors which influence logistics operations.

(2) **Characteristics of target area:**  
Define the target of operations relative to strengths, weaknesses and locations.

(3) **Opposition capabilities:**  
Describe possible courses of opposition action which may affect our operations.

b. **Our Operations:**

(1) **Present operational element disposition:**  
Define geographically the location of elements to be supported.

(2) **Operational element strength.**

(3) **Courses of operational action which may be adopted.**

c. **Logistical Situation:**

Present status of logistics elements and installations to include strengths, locations, and present mission. Include present status of major items of equipment and supplies (i.e., capabilities).

d. **Special Factors:**

Items not covered above which require special treatment in the logistical estimate. Security conditions are an example.

3. **Analysis:** Under each subheading, and for each proposed course of operational action, determine the requirements, availabilities or capabilities and indicate any limiting features.

a. **Procurement**

b. **Supply**

c. **Transportation**

d. **Real Estate and Construction**

e. **Printing**

f. **Support Services**

g. **Miscellaneous**

4. **Comparison:**

a. Evaluate the outstanding logistical elements and controlling limiting factors with respect to the accomplishment of the basic mission.

b. Discuss the advantages and disadvantages of each proposed course of action from the logistical viewpoint. Include methods of overcoming limiting features or modifications recommended in operational courses of action.

5. **Conclusions:**

a. Indicate whether the mission can be logistically supported.

b. Indicate which operational course of action can be best supported logistically.

c. List the major logistical features, if any, which must be brought to the attention of the operational planner. Include specific recommended actions on these major logistical features.

APPENDIX II

FORMAT FOR A LOGISTICAL PLAN  
(OR ANNEX TO AN OPERATIONAL PLAN)

REFERENCES : Refer to pertinent directives, orders and publications.

MAP REFERENCES: List maps referred to in plan.

1. Operational Situation

a. Background. Include such information of the overall situation as may be essential to the understanding of the logistical plan.

- b. Magnitude.
- c. Location.
- d. Assumptions.

2. Logistical Situation

The supply situation at the start of the period covered by the operational plan should be outlined as should:

- a. Facilities available for logistical support.
- b. Indigenous resources.
- c. Security factors.
- d. Supplies available ( may be separate tab).
  - (1) On hand.
  - (2) In transit—in pipeline.

3. Mission

A clear, concise statement of the logistical task to be accomplished. (Define logistical mission to be accomplished during initial and subsequent phase activities.)

4. Major Tasks for Subordinate Elements

In a separate lettered subparagraph give the specific task or responsibility of each major subordinate element.

5. Supply

- a. Authorized Levels. Estimated stock levels by days of supply.
- b. Requirements:
  - (1) List of Materials (see Appendixes III and IV). Also include a general statement of volume and rate of supply.

(2) Special requisitioning instructions.

(3) Specific instructions concerning specialized equipment.

(4) Instructions pertaining to receipts, shipments and issues.

c. Salvage. Instructions governing collection, utilization and disposition, including critical scrap.

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e. Special Supply Tasks. Instructions and responsibilities deviating from normal supply activities, such as:

- (1) Indigenous subsistence.
- (2) Contributions to allies, friendly 3rd countries, etc.

6. Procurement

Special instructions governing extent and control of local procurement and procedures for payment.

7. Materiel Maintenance

Instructions, by major equipment categories, for materiel maintenance.

8. Transportation

a. Method of employment.

- (1) Rail
- (2) Water
- (3) Air
- (4) Highway

b. Responsibilities. Designate responsibilities for operations of all types.

c. Movement Control (including security).

d. Lines of Communication (use maps where possible).

9. Construction and Base Development

a. Base development plan (refer to an appropriate tab. Also see base development check list, Appendix VII).

- b. Utilization of local resources.
- c. Additional projects.
- d. Combined command use.
- e. Indigenous responsibilities.

**10. Printing Services**

- a. Facilities required by location.
- b. Production objectives by type and volume.
- c. Security.

**11. Miscellaneous**

- a. Location of Headquarters.
- b. Reports required.
- c. Effective dates.

d. Instructions pertinent to all elements not covered elsewhere.

**NOTE:**

As a general rule, the support aspects of communication, medical services, administration (including personnel), and training are covered in separate annexes. However, appropriate cross reference in the logistics annex is considered desirable.

**Enclosure:**

Tab "A" — "Logistics Planner's Check List for the Preparation of a Logistical Plan (or Annex to an Operational Plan, Project or Program)"

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## GUIDE FOR DETERMINING SUPPLY & EQUIPMENT REQUIREMENTS (OPERATIONAL)

(1) Activity: \_\_\_\_\_ (4) Mission: \_\_\_\_\_ (6) Division: \_\_\_\_\_  
 (2) Country: \_\_\_\_\_ (5) Support Delivery: II \_\_\_\_\_; RS \_\_\_\_\_ (7) Date: \_\_\_\_\_  
 (3) Projected Strength: CW \_\_\_\_\_; HW \_\_\_\_\_ (8) Contact: \_\_\_\_\_  
 Ext: \_\_\_\_\_

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APPENDIX V

**FORMAT FOR A  
STANDING OPERATING PROCEDURE**

**Part I—Organization and Functions**

1. Application: In this section, give the purpose and scope of the standing operating procedure (SOP) and applicability of procedures prescribed.
2. Organization: Show the organization.
3. Function: A general paragraph should explain the composition of the element and broad responsibilities and functions of members.

**Part II—Command-Staff Relationships**

**Section I. General**

1. Command and Technical channels.
2. Dual responsibilities, such as one individual being both a staff officer and member of task organization.
3. Responsibility for liaison and coordination with higher, lower and adjacent elements.
4. Cooperation between staff sections.

**Section II. Intelligence**

This section outlines responsibilities for and describes the procedures for all matters pertaining to intelligence.

**Section III. Estimates—Plans—Orders**

This section outlines the responsibilities for and describes the procedures for preparation of estimates, plans and orders.

**Section IV. Security**

This section outlines responsibilities for security, area security and defense and area damage control. (This may be done by reference to an appropriate annex in the SOP.)

**Section V. Logistics**

In this section, detailed procedures should be given covering supply, transportation, procurement, real estate and construction, printing, and support services. This portion is closely related to the logistics plan (Annex) and many aspects covered in the SOP need not be repeated in the logistics plan (Annex). However, applicable references to the SOP should be made.

**Section VI. Administration**

This section should give complete and detailed procedures pertaining to internal administrative matters not included elsewhere. Activities such as the following might be included: leave policy, postal services, labor, travel, finance, law and order, records management, office hours, courier and messenger services, and handling of classified documents.

**Section VII. Command and Communication**

This section covers such activities as special instructions and reports not covered in other parts; also included are communications operations and standing communications instructions and location of the headquarters, including alternate headquarters.

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Authorized Representative

APPENDIX VI

## GUIDE FOR THE PREPARATION OF A STAFF STUDY

### 1. General

Staff studies will be submitted for consideration by a supervisor when required by him or his representative, or when an element prepares one on its own initiative concerning a subject which is clearly within its scope of responsibility.

### 2. Purpose

The purpose of the staff study is to provide the supervisor with a paper which will assist him in the consideration of a problem and enable him to reach a sound decision.

### 3. Format

To facilitate rapid and logical consideration by the supervisor on matters placed before him, a standard format is prescribed which permits an orderly transition from the problem being considered to the conclusions reached and the recommendations resulting therefrom. The format at Tab A (page 137) should be used for all staff studies submitted to the supervisor for consideration. The checklist at Tab B (page 139) should be used to insure proper preparation of the staff study.

### 4. Principal Parts

The principal parts of the staff study, which are as follows, are explained in the subsequent paragraphs:

- a. Statement of the Problem
- b. Assumptions
- c. Facts Bearing on the Problem
- d. Discussion
- e. Conclusions
- f. Recommendations
- g. Annexes
- h. Attachments
- i. Concurrences

### 5. Statement of the Problem

A proper statement of the problem is one of the most important sections of the staff study. It is imperative that the author of the staff study phrase the statement of the problem in clear and explicit language which will enable the supervisor to comprehend quickly the substance of the problem to which the staff study is addressed. The problem to be stated is the one which faces the supervisor, NOT the problem which faces the author of the staff study. The following are examples of a proper statement of the problem:

- a. "In response to a request by the supervisor, to determine whether the Blank Depot should be retained."
- b. "In response to a request by the supervisor, to develop a policy for the assignment of priorities to requisitions."

### 6. Assumptions

An assumption is anything taken for granted, a supposition, or a presumption. Assumptions are NOT REQUIRED in staff studies but may be included at the discretion of the author of the staff study. Any lengthy presentation of the assumptions deemed necessary for a thorough analysis will be placed in a lettered annex. If an annex is used for any or all of the assumptions, a paragraph will be added under this section as follows: "For (additional) assumptions, see Annex \_\_\_\_."

### 7. Facts Bearing on the Problem

A fact is anything that has actually happened or is true. This section of the staff study will set forth a summary of the pertinent facts arranged in logical sequence to facilitate understanding of the discussion in the next section. THIS SUMMARY WILL BE FACTUAL AND DEVOID OF THE AUTHOR'S OPINIONS, ASSUMPTIONS, AND DIS-



CUSSION. Any detailed presentation of the facts deemed necessary for a thorough analysis will be placed in a lettered annex. If an annex is used, a paragraph will be added under this section as follows: "For additional facts, see Annex \_\_\_\_."

## 8. Discussion

This is the section of the staff study where, through a logical analysis and evaluation, the facts bearing on the problem are converted into conclusions. Although it is desirable that the discussion be as brief as possible, it should not be curtailed to the extent of omitting consideration of any essential aspect of the problem. The technique of stating alternative solutions, the advantages and disadvantages of each, and the rationale supporting the action recommended, should be employed in those papers which lend themselves to this approach. ANY PART OR ALL OF THE DISCUSSION MAY BE PLACED IN AN ANNEX. In this instance, a paragraph will be included under this section as follows: "For (additional) discussion, see Annex \_\_\_\_." If the facts bearing on the problem are considered to lead directly to the conclusions and discussion is considered unnecessary, the discussion section may be omitted.

## 9. Conclusions

The conclusions represent the considered opinions of the author relative to the problem and provide the basis for the recommendations.

## 10. Recommendations

The recommendations will consist of concise statements of actions to be taken. A specific recommendation must be consistent with the conclusions. In approving the dispatch of an implementing attachment which reflects the conclusions in a staff study, the supervisor does, in fact, approve the conclusions, and it is unnecessary to make a separate recommendation that the conclusions be approved. However, in rare cases, there may be conclusions which are not reflected in an implementing attach-

ment but which the originator desires to have approved. In this instance, it is proper to recommend that the supervisor approve these conclusions.

*Order of Presentation of Recommendations.* The order of presentation of recommendations is as follows:

- (1) Recommendations pertaining to implementing attachments.
- (2) Recommendation pertaining to conclusions (to be included only if the implementing attachments do not reflect the conclusions).

## 11. Annexes

Information necessary to an understanding of the problem, but too detailed for inclusion in the staff study, accompanies the study as lettered annexes. These must be identified and referred to in the ASSUMPTIONS, FACTS, or DISCUSSION paragraphs.

## 12. Attachments

Memorandums, messages and directives necessary to implement the recommendations, if approved, are prepared in final form for the signature of the proper authority and accompany the staff study as numbered attachments. These must be identified and referred to in the RECOMMENDATIONS paragraphs.

## 13. Concurrences

Concurrences must be secured in writing from the offices affected by the problem. This is accomplished by providing a place at the end of the staff study for the office title, date and signature of the concurring officers.

Enclosures:

- Tab A — Format for a Staff Study
- Tab B — Checklist for a Staff Study

TAB A  
to APPENDIX VI

## FORMAT FOR A STAFF STUDY

TO:

DATE:

FROM:

SUBJECT:

### 6. RECOMMENDATIONS

- a. Provide a direct solution.
- b. Chart a complete, concise, and clear-cut course of action permitting simple approval or disapproval.

Signature \_\_\_\_\_

Title \_\_\_\_\_

### 1. PROBLEM

- a. Specific and concise statement of problem.

### 2. ASSUMPTIONS

- a. Use only assumptions required for a logical discussion of problem.
- b. Assumptions, while not facts, must have a basis or foundation of fact.
- c. Do not use assumptions when facts are available.

Annexes: (Include detailed supporting information in succeeding lettered annexes. Reference must be made to these in body of study. Staff studies should be complete without having to read annexes. Annexes should only provide correlating and substantiating information.)

### 3. FACTS BEARING ON THE PROBLEM

- a. List essential facts in logical sequence.
- b. List unfavorable as well as favorable facts.
- c. List only important facts bearing directly on problem.

Concurrences: (List here other offices or individuals affected by the problem. Provide space for date and signature of concurring officer. When there is a nonconcurrence, reasons therefor will be stated and attached as an annex.)

### 4. DISCUSSION

- a. Analyze facts collected for both advantages and disadvantages.
- b. List all feasible solutions to the problem.

Action by Approving Authority:

Date \_\_\_\_\_

Approved (Disapproved), exceptions, if any.

Signature \_\_\_\_\_

### 5. CONCLUSIONS

- a. Eliminate alternate lines of action.
- b. State the results (conclusions) derived by a reasoned judgment of the effects and implications of the essential facts.

Attachments: (Implementing memorandums, messages, and directives in final form for the signature of the proper authority.)

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TAB B  
to APPENDIX VI

## CHECKLIST FOR A STAFF STUDY

1. **Statement of the Problem:**
  - a. Did you recognize and isolate the problem?
  - b. Did you state the problem properly?
2. **Assumptions:**
  - a. Are your assumptions things taken for granted, suppositions or presumptions?
  - b. Are your assumptions essential to the solution of the problem?
  - c. Are your assumptions realistically derived?
3. **Facts Bearing on the Problem:**
  - a. Are your facts things that actually happened or are true?
  - b. Did you list all pertinent facts?
  - c. Are your facts logically arranged?
  - d. Did you exclude facts which, although true, have little or no bearing on the problem?
  - e. Did you exclude facts which are not valid?
  - f. Did you exclude "facts" which are actually assumptions?
4. **Discussion:**
  - a. Is your discussion in sufficient detail?
  - b. Does it follow a logical thought sequence?
  - c. Does it consider the advantages and disadvantages of the various courses of action?
  - d. Does it support your conclusions and recommendations?
  - e. Does it include facts which should be included in paragraph 3?
  - f. Is it brief and to the point?
  - g. Does it contain irrelevant material?
5. **Conclusions:**
  - a. Are your conclusions in sufficient detail?
  - b. Do they follow a logical thought sequence?
  - c. Do they consider the advantages and disadvantages of the various courses of action?
  - d. Do they support your discussion and recommendations?
  - e. Do they include facts which should be included in paragraph 3?
  - f. Are they brief and to the point?
  - g. Do they contain irrelevant material?
6. **Recommendations:**
  - a. Do your recommendations offer a clear opportunity for decision?
  - b. Do your recommendations derive logically from your conclusions?
  - c. Are your recommendations complete?
  - d. Are your recommendations beyond the scope of the problem?
  - e. Did you include material in your recommendations which should have been presented earlier in your study?
  - f. Did you unnecessarily repeat discussion material in your action recommended?
7. **Annexes:**
  - a. Is supporting but detailed information placed in an annex?
  - b. Are the annexes referred to and identified in the ASSUMPTIONS, FACTS, or DISCUSSION paragraphs of the staff study?
8. **Attachments:**
  - a. Are implementing attachments (memorandums, messages, and directives) included as attachments in final form for the signature of the proper authority?
  - b. Are the attachments referred to and identified in the RECOMMENDATIONS paragraph?
9. **General:**
  - a. Is the meaning of the words used clear?
  - b. Are the sentences too long and involved?
  - c. Can the thought be easily followed from sentence to sentence and from paragraph to paragraph?
  - d. Is each paragraph limited to one "thought"?
  - e. Does each paragraph contain a topic sentence?
  - f. Does the writing have force?
  - g. Is the level of abstraction too high (use of words, examples, and quotations which do not evoke concrete thoughts)?
  - h. Is the style consistent and easy to read?
  - i. Is proper credit given for sources used?
  - j. Is spelling accurate?
  - k. Have the rules of punctuation been followed?

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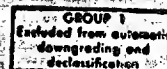
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# ORGANIZATION LOGISTICS PLANNER'S GUIDE

Prepared by  
OFFICE OF LOGISTICS

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